

CITY OF SANTA FE OFFICE OF AFFORDABLE HOUSING
REQUEST FOR QUALIFICATIONS '16/02/RFQ
HOUSING NEEDS ASSESSMENT/STRATEGIC PLAN UPDATE/ ASSESSMENT OF FAIR HOUSING UPDATE
DEADLINE FOR SUBMITTALS IS MONDAY, OCTOBER 5, 2015 AT 5:00 PM

I. SOLICITATION:

The City of Santa Fe (City) is soliciting Requests for Qualifications (RFQ) from qualified and interested consulting firms to conduct data analysis and update data tables in the Housing Needs Assessment (2013) as they pertain to the following sections in the City of Santa Fe's Five-Year Affordable Housing Plan:

- Community and Housing Profile
- Housing Needs Assessment
- Land Use and Policy Review

II. BACKGROUND:

In 2008, the City of Santa Fe released the Five-Year Affordable Housing Plan (the "Plan"), as required by the newly adopted New Mexico Affordable Housing Act (the "Act"). The Act requires that any governmental entity wishing to use public resources to support affordable housing must make those funding decisions within the context of an affordable housing plan. These plans serve to identify and analyze existing and projected housing needs; to develop goals, policies, and quantifiable objectives for increased housing types, tenure and affordability, and to address program needs for the construction, rehabilitation, preservation and financing of affordable housing.

The NM Mortgage Finance Authority provides oversight for compliance with the Act and detailed information can be found on its website: <http://www.housingnm.org/resources/affordable-housing-act-and-plans>. Since its adoption, the Act has been amended, requiring some updates to the City's plan to bring it into compliance with the statewide legislation, as well to make it contemporary with its five-year planning timeframe. The purpose of this solicitation is not to write the Plan but rather to provide data and analysis to inform the plan's content. As applicable, the data and analysis will also provide a basis for the City's update of its Assessment of Fair Housing (AFH), formerly called the Analysis of Impediments to Fair Housing (AI).

The starting point for this analysis is to identify which data tables provided in the City of Santa Fe's 2013 Housing Needs Assessment (HNA) can be applied to the relevant portions of the Plan. The HNA relies on Census data, American Community Survey updates, stakeholder surveys (with community members and employers), analysis of point-in-time local data (MLS, phone survey of local rental properties, County Assessor data, etc.), and assessment of existing programs to make recommendations for ongoing policy priorities. The HNA can be found at this link: <http://www.santafenm.gov/policyresearch> (scroll halfway down the page to the document link). Information regarding HUD's new template for the AFH is found at: <https://www.hudexchange.info/resources/documents/AFFH-Final-Rule.pdf>

III. Scope of Services

Phase 1: Update data tables in the HNA. The updated tables should conform to the New Mexico Mortgage Finance Authority's work scope, as per the Act, as outlined below.

1. Community Housing Profile
 - a. Demographic characteristics: race and ethnicity, income, age, employment, population trends.
 - b. Household characteristics: the number of existing households and housing units (by tenure).
 - c. Housing market analysis: housing costs, rents, vacancy rates, and sales prices.
2. Needs Assessment
 - a. Existing needs: the number of households with a cost burden for housing, living in overcrowded situations, or with special needs (people with disabilities, elderly, large households, female-headed households, homeless, and others), the number of homes needing rehabilitation, or at risk of no longer being affordable.
 - b. Projected needs: identify the number of new units needed, by tenure, housing type, and cost to meet current needs and accommodate expected population growth and job generation; determine number of homes to be created through new construction rehabilitation and preservation.

The work for this phase should be submitted to the Office of Affordable Housing no later than October 26, 2015 by 5 pm.

Phase 2: Prepare analysis and updated data per the New Mexico Mortgage Finance Authority's work scope, as per the Act, as outlined below:

3. Land Use and Policy Review *(As applicable, this section should correspond with HUD's template for the AFH.)*
 - a. General analysis of land use policies including zoning, subdivision regulations, size and existing use, environmental constraints, availability of infrastructure, entitlement process.
 - b. Identification of constraints: 1) Governmental (for ex. Land use controls, codes and enforcement, fees and exactions, processing and permit procedures, on/off-site improvements, reasonable accommodation); 2) Non-governmental (availability of financing, price/availability of land, cost of construction, local capacity to assist/finance/manage construction, provide housing support services, administer housing funds/programs).
4. Goals, Policies, and Quantifiable Objectives
 - a. Estimate the number/percentage increase of units, by income level (%AMI), to be constructed, rehabilitated or conserved over a set period of time.

The work for this phase should be submitted to the Office of Affordable Housing no later than January 31, 2016 by 5 pm.

IV. Submittal Requirements

- a. Project Statement. Provide a clear statement of the project, including the overall objectives and key challenges as your team understands them.
- b. Professional Qualifications. Identify previous work experience that is relevant to this project. Highlight the key features and benefits produced by the Consultant in each project. Provide references for at least three (3) sample projects, including contact names, phone numbers and email addresses.
- c. Project Team and Resumes. Provide a personnel summary of individuals participating including roles, task-led responsibility, and professional resumes.
- d. Project Schedule and Timeline for Completion. Outline specific tasks to be performed, indicating what will be done, in what sequence, and by which team member.
- e. Cost Estimate. Provide cost estimate, inclusive of NM Gross Receipts Tax, that breaks out cost according to task, personnel, and timeline for completion.

V. Evaluation & Selection Criteria

Submittals will be reviewed by a 3-person committee including staff from the City of Santa Fe's Housing and Community Development Department. Scoring/Evaluation of the proposals includes:

- a. Proposed Fee/Cost (30%)
- b. Prior experience conducting similar studies (50%)
- c. Proposed project schedule and timing (20%).

DEADLINE FOR SUBMITTALS IS MONDAY, OCTOBER 5, 2015 AT 5:00 PM

The Respondent shall submit four (4) sets of the proposal to:

Margaret Ambrosino, Senior Housing Planner
Office of Affordable Housing
Housing and Community Development Department
P.O. Box 909
500 Market Street, Suite 200
Santa Fe, NM 87504-0909